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The impact of Lisbon's Strategy on the patterns of education and training in Portugal *

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Abstract

The directives that resulted from the Lisbon Summit transformed education and training into a priority within Europe. The intended development model constituted an enormous challenge for certain member states and in particular for Portugal, where schooling patterns were far behind the European average. Consequently, in the first decade of the 21st century, Portugal defined a wide set of measures aiming for the achievement of the education patterns defined.

In this article we propose to assess the path taken by Portugal in this field, highlighting aspects related with literacy levels, early school leaving rates, gender differences, number of high school and college graduates, and engagement in lifelong learning activities. Our reflection is based upon the analysis of education, training and employment statistics between 2000 and 2010, as well as of the reports produced by the European Union to evaluate the progress of its member states in regard to the goals set for 2010 and 2020. The analysis shows major progress in the patterns of education and training of Portuguese citizens. However, this progress has not been consistent throughout all the above-mentioned domains and is clearly less evident for adult population. Furthermore, the patterns of education and training of young people still reveal a relative backwardness when compared to other European countries, although less significant than in the early 21st century.

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1. European education policies in the early 21st century

The educational directives defined by the European Union (EU) at the beginning of the 21st century highlight the importance of education and training processes to assure European competitiveness in an open and globalized economic context. They establish secondary education as a minimum baseline for inclusion in contemporary societies, but, regardless of the educational level achieved, lifelong learning became an almost imperative phenomenon. The strategic vision that permeates these directives, namely the importance they attribute to education in development processes, does not constitute their unique mark. The main innovation resides in the creation and

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implementation of a new method of political action in the field of education that was not traditionally a EU jurisdiction. The method is based on the definition of common goals, on the diffusion of good practices, on monitoring and comparing results (open method of coordination). This method defines common strategic goals although not imposing uniform models of action to be fulfilled in a predefined time period. In this context, the following benchmarks were to be achieved by 2010 (Commission of the European Communities, 2006, p.5):

- No more than 10% early school leavers;
- Decrease of at least 20% in the percentage of low-achieving pupils in reading literacy;
- At least 85% of young people should have completed upper secondary education;
- Increase of at least 15% in the number of tertiary graduates in Mathematics, Science and Technology (MST), with a simultaneous decrease in the gender imbalance;
- 12.5% of the adult population should participate in lifelong learning.

These strategic guidelines and reference goals were of great importance in the development of the Portuguese education and training system in the last decade, as will be demonstrated throughout this paper.

2. Methodology

The influence of the European guidelines on the development of the Portuguese educational system can be assessed in diverse ways: political discourse, legislation, public intervention and training programs, funding priorities and areas of improvement to the system. In this paper we focus on the evolution of the schooling patterns of the Portuguese population, comparing them with the goals defined by the EU to monitor this process. The analysis undertaken will be mainly based on national and European statistical data, highlighting aspects related with literacy levels, early school leaving rates, gender differences, number of high-school graduates, and engagement in lifelong learning activities (2000-2100). In addition, we consulted international reports relative to economic, social and educational development in several countries.

Through this methodological strategy we aim to: 1) identify the educational progress registered in Portugal in the last decade; and 2) evaluate the degree of convergence with other European states within the framework of the European Strategy for Education and Training (2010). Lastly, we describe the change that is taking place nowadays in this field as a result of the severe financial crisis with which the country is faced and that has consequences that go far beyond the economic domains (social supports, education funding, young people's expectations, school climate).

3. Education in Portugal in the transition to the 21st century: between specificity and the search for convergence

The guidelines that resulted from the Lisbon Summit, as has already been mentioned, transformed education into a priority within Europe. However, the goals established constituted an enormous challenge for some member states and in particular for Portugal, where schooling patterns, despite the progress made in the last quarter of the 20th century, were far behind the European average. This comes as no surprise if we consider that during the 19th and 20th centuries Portugal had much higher illiteracy rates than other European countries.

It was only in the second half of the 20th century that the first fully schooled generation appeared, and a clear expansion of the education system took place from that moment on. The institutionalization of democracy in the country reinforced this tendency considerably and generated deep changes in the managerial structure, finalities and modalities of state education.

A marked development in the process of schooling also took place, which was translated into the virtually exponential growth of some educational subsystems (pre-school education, secondary education, higher education). This expansion had deep implications for the number of students, teachers, ancillary staff and parents, as well as for

the number of schools, range of equipment, social support and guidance services, and administration and inspection services (Dias, 2008).

Children and adolescents were the main beneficiaries of this process of educational expansion, and despite the considerable school failure, dropout and illiteracy rates, several important changes occurred in all these domains throughout the last decade – congruently with the European directives.

3.1. Literacy levels

At the beginning of the 21st century many students completed their basic education (21%) without qualifying in Portuguese Language or without effectively finishing their compulsory schooling (15%). It is thus understandable that PISA results demonstrate that a significant part of young Portuguese people had reading competencies that would allow them, at best, to locate a piece of information in a text or to identify the main topic of what they had read (Dias, 2008). There was a large difference between Portugal's literacy levels and the European mean literacy levels. This situation is currently quite improved (Table 1).

Although it is not possible to analyze the processes underlying this change here, it is important to note that in Portugal there were a set of measures defined, aimed at reducing the literacy issues, that included initial and continuous teacher training and education, national examinations in Language, and the definition of a National Reading Plan.

Table 1. Key competencies: low achievers in reading literacy (%).

	2000	2003	2006	2009	2010
Portugal	26,3	22	24,9	17,6	17,6
EU mean	19,4	19,8	24,1	19,6	20.0

Source: Commission of the European Communities (2006, 2010, 2012)

The impact of improved reading competencies in Portugal transcends the issue of convergence between European educational systems, although it has been in this respect that the strategic 'convergence challenge' has been more clearly overcome. It above all represents a break with a recent past characterized by illiteracy rates with no parallel in the context of the most developed countries (Candeias, 2009) and an important requirement for reducing school failure and dropout rates.

3.2. Early school leaving

Early school leaving has been a structural problem in the Portuguese educational system, aggravated by the model of economic development pursued in the country, which is based on unqualified labor. It is however important to bear in mind that this problem cannot be solely ascribed to the social and economic order. In fact, mass schooling in the country was based on extremely high rates of school failure, which gave rise to dropout. School failure has always been high, even in basic education. Hence, at the beginning of the 21st century, the 9 years of compulsory schooling were still not effectively fulfilled: about 15% of young people reached the age at which they could legally leave school but without acquiring the competencies and knowledge associated with compulsory schooling. This aspect, together with the high rates of school failure registered in secondary education, contributed to an extremely high rate of early school leaving – according to the European definition for this phenomenon (young people between 18 and 24 years old without a secondary education diploma and that are not enrolled on any education or training study program). Although this problem has not yet been overcome, the progress made in the last decade is undeniable (Table 2).

Table 2. Early school leavers (%).

	2000	2001	2004	2006	2008	2009	2010
Portugal	43,1	45,2	39,4	39,2	35,4	31,2	28,7
EU mean	19,7	19,4	15,9	15,3	14,9	14,4	9,1

Source: Commission of the European Communities (2006, 2010, 2012)

The reduction in early school leaving has had a positive impact on secondary education and higher education conclusion rates in the country, which are currently a lot closer to the European average (CNE, 2010). This is very important given that this education level is presently considered as the minimum baseline for inclusion in a knowledge society. Besides, this was one of the domains in which the distance between Portugal and other European countries was most significant (CNE, 2010).

However, it is essential to consider that this positive evolution has not benefited all students equally. Important social differences still persist and are particularly visible in the following areas: national results of schools that are part of the Priority Intervention Education Territories Program (TEIP), success rates of students from different social and ethnic groups, and social origin of students that enroll in higher education programs. From an equity perspective reference should also be made to the difference that still exists in the education patterns of young people, adults and the elderly.

3.3. Participation in lifelong learning

The aspects analyzed above (improvement in reading competencies, reduction of early school leaving rates, tendency to universalize secondary education and expansion of higher education) constitute strategic goals towards the development of the European education and training systems. But they can simultaneously be considered as pre-requisites for the improvement of a lifelong learning system that has been, with diverse arguments, considered as an essential aspect of economic and social development. The progress made in Portugal in this field in the last decade is considerable (Portugal went from 2,9% in 2002 to 6,1% in 2009, as can be seen in Table 3), although unequally distributed considering the startup qualification levels (Eurydice, 2012).

Table 3. Participation in lifelong learning (% of students in education and training programs).

	2002	2004	2006	2008	2009	2010
Portugal	2,9	4,8	3,8	5,3	6,1	5,8
EU mean	8	9,4	9,6	9,5	9,2	9,1

Source: Commission of the European Communities (2006, 2010, 2012).

4. Conclusions

The considerations presented throughout this paper show that in the first decade of the 21st century Portugal invested in a more effective inclusion in the European system of education and training, thus reducing the structural problems that traditionally characterized the country. This approximation to the goals set was verified in all domains contained in the Education and Training Strategy (2010). In fact, in some domains, such as the reduction of the lowest literacy levels, Portugal surpassed the European average. It should also be highlighted that even in aspects that were not initially included in the European agenda, but that are nowadays part 2020 Agenda, progress was equally significant, viz. pre-school and higher education attendance rates.

The expansion and modernization of the Portuguese educational system did not prevent, similarly to that which was verified in several contexts, the persistence of important inequalities in accessing and obtaining success in school (age, social origin, ethnic origin). Nevertheless, the European directives led to important modifications in the country's traditional patterns of schooling.

The tendencies identified in this paper relative to the processes of convergence with European patterns of education and training should not be considered as either clear-cut or taken for granted. The current economic and financial crisis in the country has had important consequences for our education, training and employment systems. In a recent OECD report, several indicators were presented that threaten to frustrate the improvement trends of the last decade:

“In 2009, Portugal spent 5.9% of its GDP on education, up from 4.9% in 1995. But with the global economic crisis, the Portuguese government has already estimated that this share will fall to 4.7% in 2011 and probably to 3.8% in 2012. (...) With 10% of the population with an upper secondary education unemployed, Portugal has the eighth highest unemployment rate among workers with this level of education among the 34 OECD countries with available data (a decade ago, Portugal ranked 23rd of 28 OECD countries on this measure. (...) The situation is similar for those who have a tertiary education. Unemployment rates in Portugal rose from 2.7% in 2000 to 6.3% in 2010, while during the same period, the average unemployment rate among tertiary-educated adults in OECD countries rose from 3.5% to 4.7%” (OECD, 2012, pp.1-2).

The country's economic and financial context in fact heralds heavy consequences for its education and training system: reduction of public investment in education, reduction of employment perspectives among young people, migration of qualified population. It is an impoverishment predictable in the nature of the education system itself:

“It seems thus clear that Portuguese people, mainly during the second half of the 20th century, extracted the most possible wealth from an initial training with very few ‘modern’ academic qualifications, but we suspect that period has reached the end. (...) Is it a short period of depression that allows for a recollection of strategies in order to re-launch the process that, at its core, characterizes the 20th Portuguese century, or is it a new 19th century, rough with poverty, dissent and emigration?” (Candeias, 2009,p.238).

The international financial crisis of the last few years has magnified considerably the risks facing Portuguese society. Although Candeias's (2009) perspectives may prove to be too extreme, it is nowadays clear that we are in a “short period of depression”. The current economic and social indicators show that the convergence process described in this paper is under considerable pressure (OECD, 2012). Moreover, schools, especially those located in disadvantaged contexts, will be deeply affected by very difficult social situations and will have to respond to these challenges in adverse conditions: restrictive budgets; teachers with lower wages and lack of career advancement; students with few prospects of employment; families with increased risks of absolute and relative poverty. The progress achieved since the last quarter of the 20th century leave, nonetheless, some margin for hope about the possibility of continuing the path taken since the transition to democracy in the fields of education and training. Nonetheless, the rhythm and amplitude of the convergence with the most developed countries may not be what we would wish for, nor what the Lisbon Summit foresaw.

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